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27. UPC

27.1 UPC Maximum Allowable Reimbursement (MAR) Price Management

The UPC Maximum Allowable Reimbursement (MAR) Price Management dialog provides the means to manage the variables used in the MAR calculation and to run the MAR calculation on demand. It also shows the last time the MAR calculation was run and the next time it is scheduled to run as part of the End of Day processes.

The dialog is invoked by performing the following action(s):

- Display the Vendor List window defined in [Chapter 02 – Vendor List and Vendor Search](#). On the File menu, click UPC MAR Management.

The screenshot shows a Windows-style dialog box titled "UPC Maximum Allowable Reimbursement (MAR) Price Management". It has a "Management" tab selected. The dialog is divided into two main sections. The top section, "MAR Calculation Schedule", displays "Last Calculation Date: 04/23/2010" and "Next Calculation Date: 05/07/2010", with a "Recalculate" button below. The bottom section, "MAR Calculation Variables", contains five input fields with labels: "Number of days between recalculations (interval)" with value 14, "Number of days in the past to evaluate (span)" with value 90, "Minimum number of claims before the UPC MAR is automatically accepted" with value 10, "Maximum % tolerance if the new price jumps or dips more than this value it will not be automatically saved" with value 15%, and "Number of standard deviations above the mean used to automatically establish the MAR" with value 2.00. At the bottom of this section are "Save Variables" and "Reset Default Values" buttons.

Figure 1 – UPC Maximum Allowable Reimbursement (MAR) Price Management dialog

27.1.1 Menu Bar

This section describes the menu bar on the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog. The menu bar includes the following menu(s):

- Management

27.1.1.1 Management Menu

The menu includes menu items that manage UPC MAR prices. It is enabled when the menu bar is active. Its mnemonic is "M". It includes the following menu items:

- Management
 - Approve New MARs
 - Override MARs
 - Set Initial MAR Values

27.1.1.1.1 Approve New MARs Menu Item

The menu item provides access to the approval process for new MAR prices for UPCs. It is enabled when the menu is active. It has no mnemonic.

27.1.1.1.1.1 Process

When the menu item is selected, the Approve MAR Prices dialog defined in this document is invoked.

27.1.1.1.2 Override MARs Menu Item

The menu item provides access to the override process for MAR prices for UPCs. It is enabled when the menu is active. It has no mnemonic.

27.1.1.1.2.1 Process

When the menu item is selected, the Override MAR Prices dialog defined in this document is invoked.

27.1.1.1.3 Set Initial MAR Values Menu Item

This menu item provides access to the setup process used to specify initial MAR values in the database. It is enabled when the menu is active. It has no mnemonic.

27.1.1.1.3.1 Process

When the menu item is selected, the Set Initial MAR Values dialog defined in this document is invoked.

27.1.2 Controls

This section describes the behavior of the controls on the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog.

27.1.2.1 MAR Calculation Schedule Group Box

The control groups together all controls related to the MAR calculation schedule. It is enabled when the window is active. It includes the following controls:

27.1.2.1.1 Last Calculation Date Label and Value

The control displays the date on which the MAR calculation was last completed by the End of Day process. This information is read-only and cannot be changed. The value displays in the inverse color of the form.

27.1.2.1.2 Next Calculation Date Label and Value

The control displays the date on which the MAR calculation is next scheduled to be completed as part of the End of Day process. This information is read-only and cannot be changed. The value displays in the inverse color of the form.

27.1.2.1.3 Recalculate Button

The control starts the recalculation of MAR values using the MAR calculation variables saved in the database. It is enabled when the dialog is active. The button has no mnemonic.

27.1.2.2 MAR Calculation Variables Group Box

The control groups together all controls related to MAR calculation variables. It is enabled when the window is active. It includes the following controls:

27.1.2.2.1 Number of Days between Recalculations (Interval) Text Box

The control accepts the number of days the End of Day service waits between MAR calculations. It is enabled when the dialog is active. It allows the entry of numeric characters. It allows a maximum length of three (3) character(s) for the value.

27.1.2.2.2 Number of Days in the Past to Evaluate (Span) Text Box

The control accepts the number of days prior to the current date that the End of Day service includes in the span evaluated for MAR calculations. It is enabled when the dialog is active. It allows the entry of numeric characters. It allows a maximum length of three (3) character(s) for the value.

27.1.2.2.3 Minimum Number of Claims Before the UPC MAR Is Automatically Accepted Text Box

The control accepts the number of claims after which the End of Day service automatically accepts a UPC MAR value. It is enabled when the dialog is active. It allows the entry of numeric characters. It allows a maximum length of three (3) character(s) for the value.

27.1.2.2.4 Maximum % Tolerance If the New Price Jumps or Dips More Than This Value It Will Not Be Automatically Saved Masked Edit Box

The control accepts the maximum tolerance for increase or decrease in the UPC MAR value as a percentage. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "##%".

This value is used to identify large movements in the MAR value.

27.1.2.2.5 Number of Standard Deviations above the Mean Used to Automatically Establish the MAR Masked Edit Box

The control accepts the peer group standard deviation value. It is enabled when the dialog is active. It allows the entry of numeric characters and a decimal. The mask for the box is "##.##". If the decimal places are not given a value, they are filled with zeros (0).

This value is used to establish the new effective MAR for most UPCs as the peer group average plus the standard deviation value.

27.1.2.2.6 Save Variables Button

The control processes the dialog. It is enabled when the dialog is active. The button has no mnemonic.

27.1.2.2.7 Reset Default Variables Button

The control resets the values of the text boxes in the MAR Calculation Variables group box. It is enabled when the dialog is active. The button has no mnemonic.

27.1.3 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog.

27.1.3.1 *Initializing the Interface*

When the dialog is invoked, its title is "UPC Maximum Allowable Reimbursement (MAR) Price Management".

All controls initially display the last value with which they were saved.

27.1.3.2 *Recalculate MAR*

When the Recalculate button is selected, the Maximum Allowable Reimbursement (MAR) values are calculated using the MAR Calculation Variables saved in the database. The calculation is described in [Application Administration Chapter 03 - End of Day Processes](#). A confirmation message displays indicating whether MAR calculation variables were successfully recalculated.

27.1.3.3 Save Variables

When the Save Variables button is selected, the dialog is processed:

27.1.3.3.1 Verify Required Information

A check is performed to ensure required information is provided:

If any of the following controls do not contain a value, a standard error dialog is invoked with the text, "An entry is required for the {CONTROL NAME}."

- Number of Days between Recalculations (Interval)
- Number of Days in the Past to Evaluate (Span)
- Minimum Number of Claims Before the UPC MAR Is Automatically Accepted
- Maximum % Tolerance, If the New Price Jumps or Dips More Than This Value It Will Not Be Automatically Saved
- Number of Standard Deviations above the Mean Used to Automatically Establish the MAR

27.1.3.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

27.1.3.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

27.1.3.3.4 Save MAR Calculation Variables

Upon successful completion of the above-listed edits, the displayed MAR Calculation Variables are saved to the database in the EBTMARVARIABLE table.

27.1.3.4 Reset the Default MAR Calculation Variable Values

When the Reset Default Values button is selected, the displayed MAR Calculation Variables are reset to the following default values:

Control Label	Default Value
Number of Days between Recalculations (Interval)	14
Number of Days in the Past to Evaluate (Span)	90
Minimum Number of Claims Before the UPC MAR Is Automatically Accepted	10

Maximum % Tolerance, If the New Price Jumps or Dips More Than This Value It Will Not Be Automatically Saved	15%
Number of Standard Deviations above the Mean Used to Automatically Establish the MAR	2.00

27.2 Approve MAR Prices

The Approve MAR Prices dialog provides the means to manage large increases in UPC MAR prices that exceed the maximum tolerance for deviation.

The dialog is invoked by performing the following action(s):

- Display the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog defined in this document. On the Management menu, click Approve New MARs.

Peer Group	Subcategory	UPC	Description	Current MAR	New MAR	Approve?	+/-	Category MAR	Average price
PEER GROUP 1	52-001 Low Fat Milk	11110421111	Kroger 1/2% Milk	\$10.00	2.6000	<input type="checkbox"/>	-74%	\$0.00	\$1.86
PEER GROUP 1	52-001 Low Fat Milk	51933658707	Save-A-Lot 2% Milk	\$10.00	2.6000	<input type="checkbox"/>	-74%	\$0.00	\$0.00
PEER GROUP 1	52-001 Low Fat Milk	51933659001	Save-A-Lot 2% Milk	\$10.00	2.6000	<input type="checkbox"/>	-74%	\$0.00	\$149.25
PEER GROUP 1	52-002 Skim Milk	11110423054	Kroger Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	11110423122	Kroger Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	41900027704	Dean's Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	51933658509	Save-A-Lot Fat Free Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	51933659209	Save-A-Lot Fat Free Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	661005101354	Country Delite Farms Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	661005102306	Dairyland Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00
PEER GROUP 1	52-002 Skim Milk	70038364474	Best Choice Skim Milk	\$10.00	132.24...	<input type="checkbox"/>	+12...	\$0.00	\$0.00

Figure 2 – Approve MAR Prices dialog

27.2.1 Controls

This section describes the behavior of the controls on the Approve MAR Prices dialog.

27.2.1.1 Percentage Tolerance Text and Value Label

The control displays the percentage tolerance for UPC MAR price deviation. The value displays in the inverse color of the form.

27.2.1.2 MAR Prices Out of Tolerance Display Grid

The control displays all MAR price changes that exceed the maximum tolerance for deviation. It is enabled when the dialog is active. It includes the following columns:

- Peer Group
- Subcategory
- UPC
- Description
- Current MAR Value (Current MAR)

- New MAR Value (New MAR)
- Approve?
- Price Deviation (+/-)
- Category MAR
- Average Price

A row is added for each MAR price that is out of tolerance. The data grid allows the direct selection of the check boxes displayed in the Approve? column to indicate whether the price change is approved. Values in the other columns of the display grid are read-only and cannot be changed.

Rows are initially sorted in descending order by Subcategory.

27.2.1.3 Save Button

The control saves the selections in the Approve? column of the MAR Prices Out of Tolerance data grid. It is enabled when the dialog is active. The button has no mnemonic.

27.2.1.4 Close Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in the [Consistencies](#) chapter.

27.2.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the Approve MAR Prices dialog.

27.2.2.1 Initializing the Interface

When the dialog is invoked, its title is "Approve MAR Prices".

The MAR Prices Out of Tolerance data grid is populated with each UPC MAR price change that exceeded the maximum tolerance for deviation.

27.2.2.2 Save MAR Price Approvals

When the Save button is selected, the following process are started:

27.2.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- No information is required.

27.2.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

27.2.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

27.2.2.2.4 Save the MAR Price Approvals

Upon successful completion of the above-listed edits, the selections in the Approve? column of the MAR Prices Out of Tolerance data grid are added to the database.

27.2.2.3 Close

When the Close button is selected, the system attempts to close the dialog.

27.2.2.3.1 Check for Unsaved Changes

A check for any unsaved changes is performed. If there are any unsaved changes, a standard confirmation dialog is invoked with the text, "Do you want to save your changes?" If "Yes" is selected, the changes are saved to the database. If "No" is selected, the changes are discarded.

27.2.2.3.2 Close the Dialog

When the check for unsaved changes has been passed:

- The dialog is dismissed and focus is returned to the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog defined in this document.

27.3 Override MAR Prices

The Override MAR Prices dialog provides the means to override MAR prices.

The dialog is invoked by performing the following action(s):

- Display the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog defined in this document. On the Management menu, click Override MARs.

To filter the UPC listing select a Peer Group, Category or Subcategory.

Peer Group: Category: Subcategory:

Subcategory	UPC	Description	Current MAR	Previous MAR	Category MAR	Average Price	Standard Dev
02-001 Cheese in 8 or 16 oz Packag...	11110580283	Kroger Mount Cheddar Cheese	\$65.656.00	\$67.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110580306	Kroger Colby Cheese	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110581280	Kroger Sharp Cheddar Cheese Cubes	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583000	Kroger Classic Longhorn Style Colb...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583031	Kroger Longhorn Milk Cheddar Che...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583062	Kroger Longhorn Sharp Cheddar C...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583079	Kroger Longhorn Medium Cheddar ...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583949	Kroger Sharp Cheddar Cheese Fine...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110583987	Kroger Sharp Cheddar Cheese Shr...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110584052	Kroger Mozzarella Cheese Shredded	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110584359	Kroger Colby Cheese Finely Shredd...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110584427	Kroger Mild Cheddar Cheese Finely ...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02-001 Cheese in 8 or 16 oz Packag...	11110584434	Kroger Mozzarella Cheese Finely S...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Effective Date:

Figure 3 – Override MAR Prices dialog

27.3.1 Controls

This section describes the behavior of the controls on the Override MAR Prices dialog.

27.3.1.1 Peer Group Drop-down List

The control provides a list from which to select a peer group by which to filter the content of the MAR Prices data grid. It is enabled when the dialog is active.

27.3.1.2 Category Drop-down List

The control provides a list from which to select a UPC category by which to filter the content of the MAR Prices data grid. It is enabled when the dialog is active.

27.3.1.3 Subcategory Drop-down List

The control provides a list from which to select a UPC sub-category by which to filter the content of the MAR Prices data grid. It is enabled when the dialog is active.

27.3.1.4 MAR Prices Display Grid

The control displays MAR prices based on the Peer Group, Category, and Subcategory selected. It is enabled when the dialog is active. It includes the following columns:

- Subcategory
- UPC
- Description
- Current MAR Value (Current MAR)
- Previous MAR Value (Previous MAR)
- Category MAR
- Average Price
- Standard Deviation (Standard Dev)

A row is added for each UPC in the selected Peer Group, Category, and Subcategory. The data grid allows the direct editing of the Current MAR value of a displayed UPC record. Values in the other columns of the display grid are read-only and cannot be changed.

Rows are initially sorted in ascending order by Subcategory.

27.3.1.5 Effective Date Calendar Date Control

The control accepts the date on which changes made to the Current MAR values of UPCs go into effect. It is enabled when the dialog is active. The down arrow displays a calendar from which the date can be selected.

27.3.1.6 Save Button

The control saves the entries in the Current MAR column of the MAR Prices data grid. It is enabled when the dialog is active. The button has no mnemonic.

27.3.1.7 Close Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in the [Consistencies](#) chapter.

27.3.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the Override MAR Prices dialog.

27.3.2.1 Initializing the Interface

When the dialog is invoked:

- Its title is "Override MAR Prices".
- The Peer Group drop-down list is initially populated with the first peer group in the list.

- The Category drop-down list is initially blank (cleared).
- The Sub-category drop drop-down list is initially blank (cleared).
- The MAR Prices data grid is populated with each UPC MAR price.
- The Effective Date calendar date control is populated with the current date.

27.3.2.2 Filter the MAR Prices

When the value of one of the following "filter" drop-down lists changes, the content of the MAR Prices data grid is cleared and populated with UPC prices that match the specified criteria in all of the "filter" drop-down lists:

- Peer Group
- Category
- Subcategory

27.3.2.3 Check Changed MAR Prices

Upon change in focus from a Current MAR field in the MAR Prices data grid, the system compares the value entered into the Current MAR column to the previous Current MAR value. If the change in value exceeds the maximum tolerance for deviation, a standard confirmation dialog is invoked with the text, "The value entered exceeds the maximum tolerance for deviation. Accept this change?" If the "Yes" button is clicked, the system continues. If the "No" button is clicked, the system returns focus to the Current MAR value for editing.

27.3.2.4 Save

When the Save button is selected, the following processes are started:

27.3.2.4.1 Verify Required Information

A check is performed to ensure required information is provided:

- If the Effective Date calendar control does not contain a value, a standard error dialog is invoked with the text, "A selection is required for the Effective Date."

27.3.2.4.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- If an invalid value is found in the Current MAR column of the MAR Prices data grid, a standard error dialog is invoked with the text, "The Current MAR values must be valid dollar amounts."
- If the value in the Effective Date calendar date control is in the past, a standard error dialog is invoked with the text, "The Effective Date must be equal to or greater than today's date."

27.3.2.4.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

27.3.2.4.4 Save MAR Prices

When the above-listed edits are completed successfully, and no errors are found:

- The entries in the Current MAR column of the MAR Prices data grid are saved to the database.

27.3.2.5 Close

When the Close button is selected, the dialog is dismissed, and focus is returned to the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog.

27.4 Set Initial MAR Values

The Set Initial MAR Values dialog provides the means to designate the initial MAR values for the database.

The dialog is invoked by performing the following action(s):

- Display the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog defined in this document. On the Management menu, click Set Initial MAR Values.

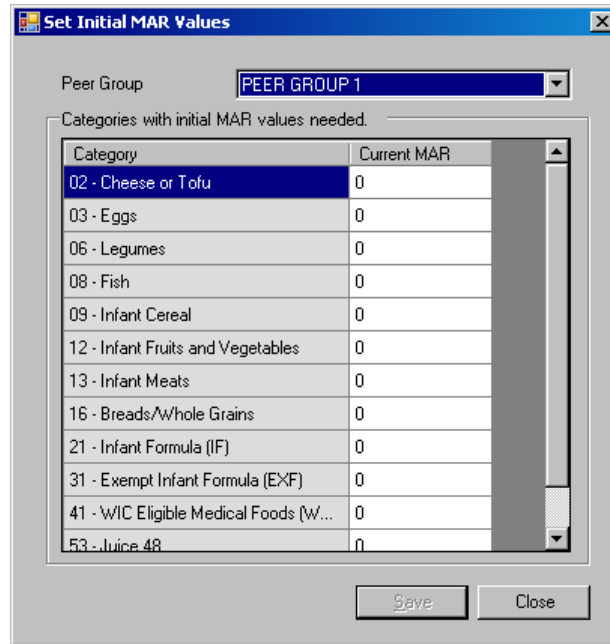


Figure 4 – Set Initial MAR Values dialog

27.4.1 Controls

This section describes the behavior of the controls on the Set Initial MAR Values dialog.

27.4.1.1 Peer Group Drop-Down List

The control provides a list from which to select a peer group by which to filter the content of the Categories with Initial MAR Values Needed display grid. It is enabled when the dialog is active.

27.4.1.2 Categories with Initial MAR Values Needed Display Grid

The control displays a list of initial UPC MAR values that need to be set based on the Peer Group selected. It is enabled when the dialog is active. It includes the following columns:

- Category
- Current MAR

A row is added for each Category in the selected Peer Group that needs an initial MAR value to be defined. The display grid allows the direct editing of the Current MAR value of a displayed Category. Values in the Category column of the display grid are read-only and cannot be changed.

Rows are initially sorted in ascending order by Category.

27.4.1.3 Save Button

The control saves the changes in the Current MAR column of the Categories with Initial MAR Values Needed display grid where the previous MAR value was zero (0) or undefined. It is enabled when the dialog is active. The button has no mnemonic.

27.4.1.4 Close Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in the [Consistencies](#) chapter.

27.4.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the Set Initial MAR Values dialog.

27.4.2.1 Initializing the Interface

- When the dialog is invoked, its title is "Set Initial MAR Values".
- The Peer Group drop-down list is initially populated with the first peer group in the list.
- The Categories with Initial MAR Values Needed display grid is populated as follows:
 - On initial implementation of EBT functionality, all Categories for the selected Peer Group will be displayed. The Current MAR Price for each will be zero (0).
 - After any MAR values have been saved to the database, this grid will display only the Categories for which the initial MAR values need to be set. The Current MAR Price for each will be zero (0). When new products are added at a later date, the Categories that the new products fall under will also display in the grid.

27.4.2.2 Filter the Categories

When the value in the Peer Group drop-down list changes, the content of the Categories with Initial MAR Values Needed display grid is cleared and populated with Categories and Current MAR prices that match the specified criteria.

27.4.2.3 Save

When the Save button is selected, the following processes are started:

27.4.2.3.1 Verify Required Information

A check is performed to ensure required information is provided:

- No information is required.

27.4.2.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

27.4.2.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

27.4.2.3.4 Save Current MAR Prices

When the above-listed edits are completed successfully, and no errors are found:

- The entries in the Current MAR column of the Categories with Initial MAR Values Needed display grid are saved to the database where the MAR value was previously zero (0) or undefined.
- Existing or non-zero MAR values will not be changed.
- A standard message dialog is invoked with the text, "Changes saved".

27.4.2.4 Close

When the Close button is selected, the system checks for unsaved edits:

- If any unsaved edits are found, a standard message dialog is invoked with the text, "Do you want to save your changes?" If the user selects "Yes", the edit and save routines are invoked for this dialog. If the user selects "No", the dialog is dismissed and focus is returned to the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog.

- If no unsaved edits are found, the dialog is dismissed and focus is returned to the UPC Maximum Allowable Reimbursement (MAR) Price Management dialog.